

Customer Satisfaction

Meets/Exceeds Expectations

Works very well with clients as well as all staff members
Has a very warm rapport with everyone she comes in contact with
Follows up with clients to ensure no one feels forgotten or lost in the process
Clearly enjoys the "people" aspect of his position
Consistently answers the phone with a smile and a friendly hello
Readily admits when she doesn't know the answer to a particular query
Outlines the steps that she will take to resolve a problem
Receives ongoing positive feedback from clients-both verbally and in writing
Has become the "go to guy" for clients who seek his advice to solve problems
Excels at providing timely feedback to even the most difficult customers
Consistently gains necessary approvals and authorizations
Is able easily to switch from English to Spanish and back again
Is an empathetic and focused listener
Skillfully overcomes customers' objections
Deals with challenging customers without becoming aggressive
Has developed a loyal customer base and a high rate of repeat business
Enjoys identifying "out-of-the-box" solutions for clients with special needs
Skillfully manages all but the most challenging customer situations
Knows when to ask for additional support from team management
Is able to redefine the customer service process to meet clients' changing needs
Overcomes objections in a logical and conversational fashion

Needs Improvement

Receives ongoing substandard customer satisfaction scores
Does not manage customer expectations by explaining reasons for delays
Has difficulty saying *no* or tactfully telling customers that they must wait their turn
Refers too many customer queries to management for final resolution
Has received numerous customer complaints for failing to follow up as promised
Cannot yet demonstrate sufficient knowledge of company products
Misses opportunities for cross-selling and overcoming initial objections

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